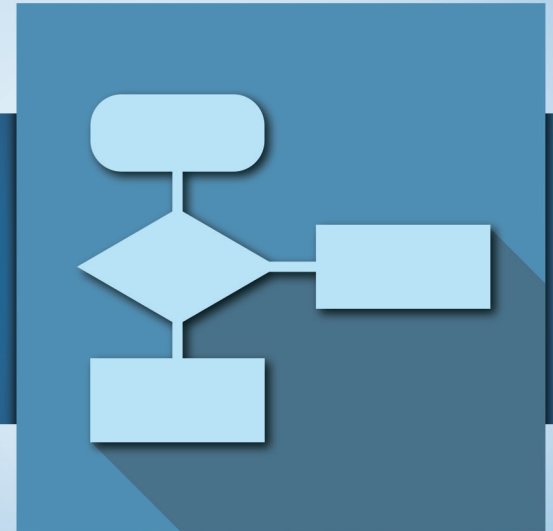


# Solution Guide

PROJECT .03

# Project & Task Management

Find it online: [smartsheet.com/pm-solutions/project-task-management](https://smartsheet.com/pm-solutions/project-task-management)



# Project & Task Management

Project management involves coordinating the right people, processes and technologies to deliver on project goals. Project managers do it all – they help structure plans, mobilize resources, support execution, hold people accountable, track milestones and more. With task management, they can help teams and individuals get stuff done – whether as part of a project or in their everyday job. This guide is built to help you use Smartsheet to achieve your project and task management goals.

## Seamlessly coordinate tasks

Maintain up-to-date task lists for the team and individual members to ensure everyone is on track.

## Increase project team productivity

Spend less time reporting and more time delivering with automatic rollup views of key project information.

## See status and progress in real time

Store and access information in real time via desktop, tablet or mobile device.

## Manage traditional and agile projects

Whether managing traditional waterfall projects or agile projects, Smartsheet has you covered



# Who should use this guide?

Whether you're a professional project manager, someone who just happens to manage projects, or really anyone that has a list of things to get done, Smartsheet will help you coordinate all aspects of the project and manage your tasks.

Common roles/titles who would benefit from this solution include:

**Program Managers**

**Project Managers**

**Project Analysts**

**Project Consultants**

**Business Analysts**

**Subject Matter Experts**

**Operations Managers**

**Operations Specialists**

# What You'll Learn

This guide is designed to show you how you can deliver on project goals with Smartsheet.

This guide will cover the following:

- 1 An overview of the solution
- 2 A tour of the individual sheets
- 3 How to get going
- 4 Helpful resources and cheat sheets



# Components

## 1 PLAN

Project Charter

Project Plan

Project Plan for Agile

Define, organize and sequence the high-level tasks that need to be accomplished.

## 2 EXECUTE

Team Task Tracker

Individual Task Tracker

Give your teams an easy way to coordinate and execute on tasks.

## 3 REPORT

Project Rollup Dashboard

Weekly Status Report

Make reporting as seamless as possible for your project teams.

# Project Charter

The leading cause of failed projects is the lack of clear goals at the project's onset. The Project Charter helps you avoid this failure by defining what the project will accomplish and how you will proceed. With rich discussion, collaboration and sharing capabilities, Smartsheet is the perfect tool to create and share your Project Charter with all key stakeholders.

The screenshot shows a Smartsheet spreadsheet titled 'Project Charter' with a hierarchical structure. The 'Save as Template' dialog box is open, showing the template name 'Project Charter Template' and a description 'Please use this template for all new project charters in the program!'. The dialog also has options to keep data and formatting, attachments, discussions, and active forms.

#	Section	Body Text	Instructions
1	<b>Project Charter</b>		Instructions
3	<b>Executive Summary</b>		
4	Problem Statement	Existing manual processes are leading to higher than expected defect rates. Much of this can also be attributed to recent spike in demand. Our current workforce is unable to maintain quality standards at current production volumes.	< Describe the problem that this project is address
5	Project Overview	This project will seek to automate key manufacturing processes in an effort to reduce defect rates. The project team will partner with process and automation experts to identify those processes that (1) are leading to high defect rates and (2) those that best lend themselves to automation.	< Provide a high level summary of the project, des proposed solution.
6	Supporting Documentation	<a href="#">Business Case</a> <a href="#">Roles &amp; Responsibilities (RACI)</a> <a href="#">Project Plan</a>	< Link to supporting documentation, like a busines matrix or project plan.
7	<b>Authorization</b>		
8	Role	Name	
9	Project Manager	Alex Bright, Senior Project Manager	
10	Project Sponsor	Frank Carlson, Director of Project Management	
11	Executive Sponsor	Shari Wise, Vice President of Operations	
12	<b>Project Objectives</b>		
17	<b>Expected Benefits</b>		
22	3.0 <b>Scope Details</b>		
31	4.0 <b>Project Milestones</b>		
5.0	<b>Estimated Costs &amp; Resources</b>		

- A** Use the structure in this template to ensure that all aspects of the project are thought through.
- B** Group sections using hierarchy for easy navigation.
- C** Decide who can view and edit the charter with simple and secure sharing.
- D** Save the sheet as a template so a charter can easily be created for each new project.

**A** Highlight tasks on the Critical Path in Gantt view to see tasks that impact your project's finish date.

**B** Attach any type of file and have discussions within the sheet to keep things in context.

**C** Toggle to a Gantt Chart view so you can visualize timelines and progress.

**D** Create dependencies between tasks so your schedule is automatically updated when things change.

## Project Plan

Having a plan is only a part of successful project management. How you refine, communicate, and execute on a plan is even more important. Smartsheet makes it easy to update tasks, manage dependencies, identify the critical path, track progress, store project files and more, all in one easily shareable and secure location.

The screenshot displays the Smartsheet Project Plan interface. On the left, a table lists project tasks with columns for Task Name, Start, Finish, Task Duration, % Comp, Progress, and Assigned To. The tasks are organized into groups: Plan, Task Group 1, Task Group 2, Task Group 3, Design, and another Task Group 1. A Gantt chart view is shown on the right, visualizing the timelines and dependencies between tasks. A callout box labeled 'B' shows a 'Predecessors' field with the value '5' and a 'Comments' field with the text 'We still have a dependency on the completion of task 2.' Callouts A, B, C, and D are placed on the interface to highlight specific features: A points to a task in the Gantt chart, B points to the Predecessors field, C points to the Gantt chart view, and D points to a task dependency line.

Task Name	Start	Finish	Task Duration	% Comp	Progress	Assigned To
<b>Plan</b>	01/06/16	01/27/16	18.75d	28%		Karen
<b>Task Group 1</b>	01/06/16	01/07/16	7d	50%		Alex A.
Task 1	01/06/16	01/06/16	1d	100%		Karen Z.
Task 2	01/07/16	01/07/16	2d	100%		Karen
<b>Task Group 2</b>	01/07/16	01/19/16	6d	25%		Alex A.
Task 1	01/07/16	01/08/16	1d	100%		Alex
Task 2	01/11/16	01/15/16	4d	33%		Alex
Task 3	01/11/16	01/19/16	2d	0%		Karen
<b>Task Group 3</b>	01/08/16	01/27/16	5.75d	26%		Comine
Task 1	01/08/16	01/19/16	3.75d	5%		Comine
Task 2	01/18/16	01/27/16	2d	5%		Comine
Task 3	01/16/16	01/22/16	4d	100%		Karen
Task 4	01/17/16	01/20/16	2d	0%		Karen
<b>Design</b>	01/25/16	02/02/16	5.5d	67%		
<b>Task Group 1</b>	01/25/16	02/02/16	5.5d	67%		Comine
Task 1	01/28/16	02/02/16	3.5d	100%		Alex
Task 2	01/25/16	01/28/16	2d	33%		Comine

# Project Plan for Agile

Traditional projects involve a series of tasks laid out for the entire project, listing task durations, task owners, and dependencies. Agile project plans, on the other hand, are based on features grouped in shorter, less rigid timeframes called sprints. Manage your entire project portfolio in Smartsheet, whether you're following traditional, agile, or both.

	Repc	Status	Progress	Task Name	Feature Type	Story Points	Duration	Start	Finish	Assigned To	Sprint	Predecessors
1				<b>Agile Project Summary</b>								
2		🚩	🟡	Project Sierra				06/02/15		Sally J.		
3												
4				<b>Agile Project Tasks</b>			24d					
5			🟢	Sprint 1		93	24d	06/02/15	07/03/15			
6		🚩	🟢	Feature 1	Security	8	0 625d	06/02/15	06/02/15	Sally J.	1	
7			🟢	Task 1			5h	06/02/15	06/02/15	Sally J.	1	
8			🟢	Feature 2	Maintenance	5	3.5d	06/02/15	06/05/15	Jacob S.	1	
9			🟢	Task 1			4h	06/02/15	06/02/15			
10			🟢	Task 2			2d 5h	06/03/15	06/03/15			
11		🚩	🟢	Feature 3	Account Management	20	11d	06/02/15	06/02/15			
12			🟢	Task 1			4h	06/02/15	06/02/15			
13			🟢	Task 2			2d 5h	06/03/15	06/03/15			
14			🟢	Task 3			9d	06/04/15	06/04/15			
15			🟢	Feature 4	Security	13	9d	06/03/15	06/03/15			
16			🟢	Feature 5	Maintenance	8	7d	06/05/15	06/05/15			
17			🟢	Feature 6	Security	2	5d	06/03/15	06/03/15			
18			🟢	Feature 7	Maintenance	13	4d	06/05/15	06/05/15			
19			🟢	Bug 1		2	3h 15m	06/03/15	06/03/15			
20			🟢	Bug 2		1	1d	06/04/15	06/04/15			
21			🟢	Sprint 2		21	5d	06/17/15	06/17/15			
22			🟢	Feature 11		13	5d	06/17/15	06/17/15			
23		🚩	🟢	Feature 12	Maintenance	5	1d	06/17/15	06/17/15			

### Publish Options

**Read Only - HTML**  
Lightweight version of sheet without row attachments or discussions  
 OFF

**Read Only - Full**  
Rich version of sheet with the ability to download row attachments and discussions  
 OFF

**Edit by Anyone**  
Rich version of sheet with the ability to edit cells and manage row attachments and discussions  
 OFF

**iCal (Calendar)**  
Add key dates from this sheet to your non-Smartsheet calendar  
 OFF

- A** Flag any task to have it show up on the Project Rollup Dashboard (introduced later in this guide).
- B** Use hierarchy to organize the work within each sprint.
- C** Track duration in virtually any increment - days, hours, and even minutes.
- D** Securely publish the sheet or embed it in a website so your stakeholders can see what's coming and when.
- E** Assign story points to features to help you allocate resources accordingly.

- A** Use custom auto-numbering schemes to give each task a unique identifier for easy reference and reporting.
- B** Set email reminders on important dates, like a task end date, so you're notified the moment a task is complete.
- C** Assign owners, pulled from your organization's global address list, to each task.
- D** Create conditional formatting to cross out tasks as they are marked "Done".

## Team Task Tracker

Not all tasks fit cleanly into a project plan. In reality, a lot of work isn't specific to any one project, like everyday coordination or administrative work. The Team Task Tracker allows managers to have all the capabilities they need to balance work and gives the project team a hub to view and coordinate all tasks.

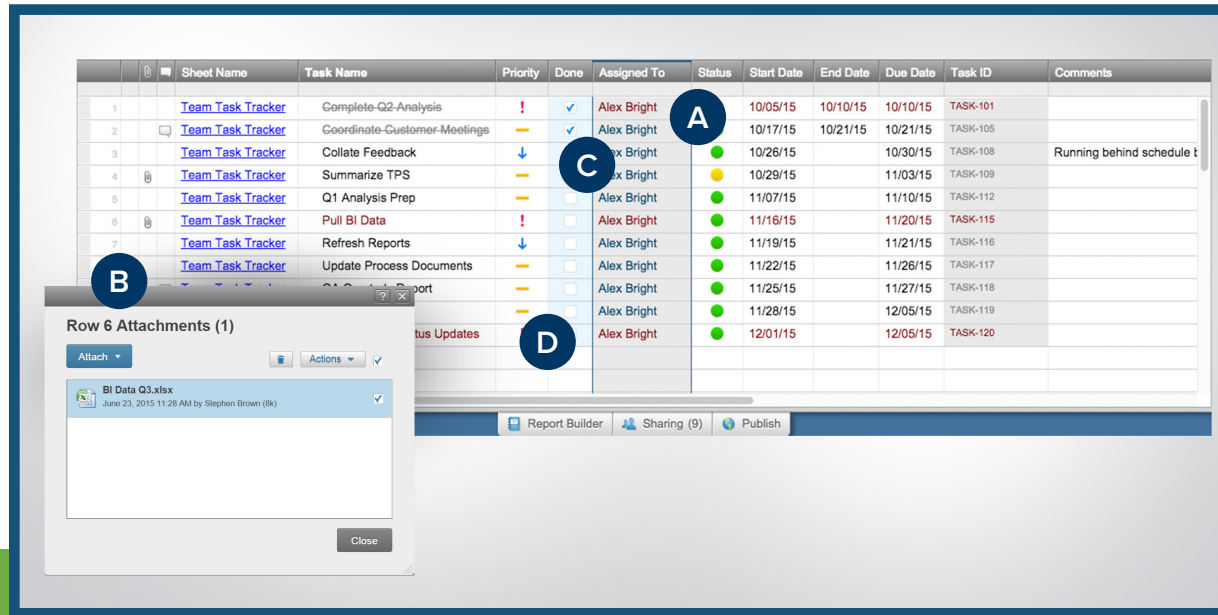
The screenshot shows a spreadsheet titled "Team Task Tracker" with columns for Task ID, Priority, Status, Task Name, Assigned To, Start Date, End Date, Due Date, Done, and Comments. The spreadsheet contains 11 tasks with various priorities and statuses. Callout A points to the "TASK-101" header. Callout B points to a "Reminders" dialog box for "Row 7: Coordinate Customer Meeting" with a "New Reminder" button and a date selection field. Callout C points to the "Assigned To" column. Callout D points to a "Conditional Formatting" dialog box with rules for "Done" and "Priority" columns.

Task ID	Priority	Status	Task Name	Assigned To	Start Date	End Date	Due Date	Done	Comments
TASK-101	!	●	Complete Q2 Analysis	Alex Bright	10/05/15	10/10/15	10/10/15	✓	
TASK-102	—	●	Analyze Planned vs. Actuals	Frank Carlson	10/08/15	10/12/15	10/12/15	☐	We are in the process of reconciling a errors fo
TASK-103	!	●	Research Opportunities	Shari Wise	10/11/15	10/18/15	10/18/15	✓	
TASK-104	—	●	Develop Plan	Sally Jones	10/14/15	10/18/15	10/18/15	✓	The plan is attached to this row.
TASK-105	—	●	Coordinate Customer Meeting	Alex Bright	10/17/15	10/21/15	10/21/15	✓	
TASK-106	!	●	Prepare Presentation	Frank Carlson	10/20/15	10/22/15	10/22/15	☐	Finished the presentation but we have an open
TASK-107	—	●	Update Requirements Matrix	Shari Wise	10/23/15	10/30/15	10/30/15	☐	We incorporated all of the client's requested ch
TASK-108	↓	●	Collate Feedback	Alex Bright	10/26/15	10/30/15	10/30/15	☐	Running behind schedule but should still make
TASK-109	—	●	Summarize TPS	Alex Bright	10/29/15	11/03/15	11/03/15	☐	
TASK-110	—	●	Research Industry Trends	Frank Carlson	11/01/15	11/05/15	11/05/15	☐	



# Individual Task List

With so many moving parts, it can be challenging to focus on what's most important. Creating individual task lists in Smartsheet helps keep each contributor focused on what they need to get done. They can check off tasks, add comments, attach files and more.



**A** Help focus your team by giving each member his or her own task list.

**B** Attach task-related documents and have discussions with other project team members.

**C** Use symbols to visually represent task information, like priority.

**D** Simply check off tasks as you complete them with checkbox columns.

\* Changes made to this Individual Task List are automatically reflected back to the Team Task Tracker.

**A** Any row flagged on a project plan shows up on the dashboard so management can see the most critical tasks in a single view.

**B** Automatically send a copy of the dashboard to key stakeholders on a recurring basis.

**C** Customize the information that shows up in the dashboard using the Report Builder.

**D** Add links to the source sheets so anyone can dig into the details.

## Project Rollup Dashboard

It can be hard to sift through multiple project plans and hone in on the tasks worth reporting to program leadership. Smartsheet's Project Rollup Dashboard makes it easy for project managers to roll important tasks, features, milestones or other project information into a single view. By simply flagging any row in a project plan, the information in that row shows up in this dashboard.

The screenshot displays the Smartsheet Project Rollup Dashboard interface. The main table lists project items with columns for Status, Progress, Sheet Name, Report, Primary, Days, Story Points, Sprint, Start, Finish, and Comments. Callout A points to a row for 'Project Sierra' with a red flag icon. Callout B points to a 'Send as Attachment' dialog box with a 'Recurrence' section. Callout C points to a 'Report Builder' dialog box. Callout D points to a 'Project Plan for Agile' link in the main table. The dashboard also shows a 'Project Summary' sidebar with sections for 'Project Alpha', 'Project Tasks', and 'Plan'.

	Status	Progres	Sheet Name	Report	Primary	Days	Story Points	Sprint	Start	Finish	Comments
1	●		<a href="#">Project Plan</a>	🚩	Project Alpha	23			01/05/16	02/04/16	Project Alpha is currently on s
2	●		<a href="#">Project Plan</a>	🚩	Task Group 1	4			01/05/16	01/08/16	
3	●		<a href="#">Project Plan</a>	🚩	Task 1	2			01/05/16	01/06/16	
4	●		<a href="#">Project Plan</a>	🚩	Task Group 2	10			01/11/16	01/22/16	
5	●		<a href="#">Project Plan for Agile</a>	🚩	Project Sierra				06/02/15	07/03/15	
6	●		<a href="#">Project Plan for Agile</a>		Feature 1		8	1	06/02/15	06/02/15	
7	●		<a href="#">Project Plan for Agile</a>		Feature 3		20	1	06/02/15	06/16/15	
8	●		<a href="#">Project Plan for Agile</a>		Feature 7		13	1	06/05/15	06/10/15	
	●		<a href="#">Project Plan for Agile</a>		Feature 12		5	2	06/17/15	06/17/15	
	●		<a href="#">Project Plan for Agile</a>		Feature 12				TBD	TBD	

# Weekly Status Report

Nobody likes being left in the dark. One of a project manager's duties is to inform leadership teams of project status. To do this, it is absolutely critical that you receive frequent updates from your teams. Use a web form to streamline the weekly status report submission process -- you can easily set up recurring reminders with a link to the form and automatically insert completed forms into the sheet.

**A** Use a fully customizable web form to gather submissions and then automatically add them to the sheet.

**B** Easily verify that all team members have made their submissions by filtering or sorting on any column, like Name, Date Submitted or Project Name.

The screenshot displays a web interface for a project management tool. On the left, a 'Status Report' form is open, featuring fields for 'Date Submitted' (06/23/15), 'Name \*', 'Manager's Name', 'Project Name' (with radio buttons for Project Alpha, Bravo, Charlie, Delta, Sierra, and Tango), and 'Status Summary'. A callout 'A' points to the 'Date Submitted' field. On the right, a table shows a list of status reports. A callout 'B' points to the 'Name' column of the first row. The table has columns for Name, Date Submitted, Manager, Project Name, Status Summary, Key Accomplishments, Upcoming Tasks, and Risks & Issues. The first row shows Stephen Brown, 10/16/15, Sarfraz Ali, Project Alpha, and a status summary of 'All tasks are progressing well...'. The bottom of the interface shows navigation tabs for Attachments, Discussions, Update Requests, Web Forms (1), and Publish.

Name	Date Submitted	Manager	Project Name	Status Summary	Key Accomplishments	Upcoming Tasks	Risks & Issues
Stephen Brown	10/16/15	Sarfraz Ali	Project Alpha	All tasks are progressing well. I have the bandwidth to take on a few more small tasks.	Finished the Q2 Analysis and gave the draft report to the leadership team.	Next week I'll focus on preparing the presentation for the steering committee (which is next Thursday). I'll also be refreshing the data for all of the canned reports.	No risks right now. I don't have everything I need for the steering comm meeting.
enelli			Project Alpha	I don't have any concerns with the target end dates. All Project Alpha tasks are progressing well.	Updated the requirements matrix. Published the new specifications.	Beginning requirements gather for Phase II.	Several key stakeholders needed for requirements out of the office next week.
enelli			Project Alpha	Didn't make as much progress as I'd wanted to this week due to a few unexpected issues.	Wrote the TPS summaries. Compiled half of the scorecards.	Finish compiling the scorecards. Prepare for the next milestone review.	
enelli			Project Delta	We continue to work through the backlog, making steady progress.	Fixed most of the bugs in our backlog related to the new APIs.	Finish clearing out the backlog of bugs.	
			Project Sierra	My entire week was focused on the customer advisory panel, which went very well.	Led the annual customer advisory panel discussion with members from Project Sierra.		
			Project Sierra	The prep for the After Action Review is nearly complete. We just need sign-off from a few more leads.			

# Jump-Start Your Project & Task Management with Smartsheet



## Read through the solution guide

You've had an overview of the solution – now try Smartsheet for yourself.



## Sign up or log in to Smartsheet

Sign up at [smartsheet.com/pm-solutions/project-task-management](https://smartsheet.com/pm-solutions/project-task-management)  
You can also use this with your existing account by logging in.



## Open the Getting Started Sheet

Once you're in Smartsheet, click on the "Getting Started" sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.



## Customize the sheet

The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.



## Start working and sharing

To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.

## Other Recommended Steps



### Delete sheets you don't need

Deleting a sheet is easy! You can learn how to [here](#).



### Build your own sheet

We know you have unique needs – that's why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.



### Use the “cheat sheets” in this guide

To help you get the most out of Smartsheet, we've included cheat sheets for formulas and shortcuts at the end of this guide.

# Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - [help.smartsheet.com](https://help.smartsheet.com)

Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - [community.smartsheet.com](https://community.smartsheet.com)

Ask questions, share best practices, and get help.

**Submit your question** - [solutions@smartsheet.com](mailto:solutions@smartsheet.com)

Want personalized help? Our design and services teams have you covered!

**Send us your feedback** - [help.smartsheet.com/customer/portal/emails/new](https://help.smartsheet.com/customer/portal/emails/new)

Share your thoughts or suggestions about Smartsheet or our Solutions.




**Plans and Pricing** - [smartsheet.com/pricing](https://smartsheet.com/pricing)



Enjoy your 30-day free trial.



# Smartsheet Cheat Sheet



## Keyboard Shortcuts


### Basics

 /  +  Enters **edit mode** on selected cell

 +  **Saves all** unsaved information

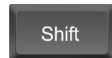
 +  **Undo** the previous action since last save

 +  **Redo** the previous action since last save

 **Inserts** a row above the selected row.




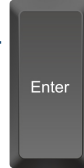

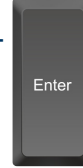
To insert multiple rows at once, press



and select multiple row headers, then click



### Formatting

 +  (or)  +  Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.

 +  **Indents** Primary Column only

 +  **Outdents** Primary Column only

 +  **Italic**



 +  **Fill down**  
(also available by dragging cell corner)

 +  **Bold**

 +  **Underline**

**NOTE:** Mac users should use  instead of  unless otherwise noted.

# Formulas

 +  **x1** Inserts \$ before column name (horizontal cell reference lock).

**x2** Inserts \$ after column name (vertical cell reference lock).

**x3** Inserts \$'s around column name (full cell reference lock).

# Date Column Cells

**t:** Inserts today's date.

**+**: Enters date x days from today.

**-**: Enters date x days before today.

**mon / tue / wed /** etc... Inserts date of the current week's Monday, Tuesday, Wednesday, etc.

**yes:** Inserts yesterday's date.



**tom:** Inserts tomorrow's date.



**next week:** Inserts date seven days from today.


**last week:** Inserts date from seven days ago.



**Dec 15 / Jan 3 /** etc: Inserts date of string entered.


# Additional



 +  Displays the **Open a Sheet** form.


 +  Displays the **Go To Row** form. Type in the row number you'd like to scroll to then click OK.


 Takes you to the first cell of the row you are currently on.


 +  Takes you to the top left cell of your sheet.

 Takes you to the last cell of the row you are currently on.

 +  Takes you to the bottom right cell of your sheet.

 Moves you up in your sheet.

 Moves you down in your sheet.

 Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our [Column Types](#) article.



# Smartsheet Cheat Sheet

## Formulas

### Numeric Formulas

**SUM():** Adds selected values, or a range of cells.

Example: =SUM(Cost1: Cost5)

Result: 1125.75

**AVG():** Averages selected values, or a range of cells.

Example: =AVG(Cost1: Cost5)

Result: 225.15

**MAX():** Returns the highest numeric value, or latest date.

Example: =MAX(Cost1: Cost5)

Result: 425.75

**MIN():** Returns the lowest numeric value, or earliest date.

Example: =MIN(Cost1: Cost5)

Result: 100

**INT():** Returns the integer portion of a given number.

Example: =INT(Cost5)

Result: 425

**ROUND():** Rounds a given number to the desired # of digits.

Syntax: ROUND(cell1, #\_of\_digits)

Example: =ROUND(Cost5, 1)

Result: 425.8

**ABS():** Returns the absolute value of a given number.

Example: =ABS(-85)

Result: 85

**COUNT():** Counts non-blank cells in a given range.

Example: =COUNT([Task Name];[Task Name])

Result: 5

**LEN():** Returns the number of characters (length) in a given cell.

Example: =LEN([Task Name]5)

Result: 6  
NOTE: Formatting/currency values aren't included.  
Dates have a length of 5.

# Logic Formulas

**IF():** Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

**Syntax:** IF(logical\_test, value\_if\_true, value\_if\_false)

**Example:** =IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger")

**Result:** Date 2 is Larger

**ISBLANK():** Used within an IF formula to test if a cell is blank.

**Example:** =IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn't blank")

**Result:** Cell isn't blank

**ISTEXT():** used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

**Example:** =IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn't text")

**Result:** Cell isn't text

**ISNUMBER():** Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

**Example:** =IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn't a number")

**Result:** Cell isn't a number

**ISDATE():** Used in an IF formula to test if a cell contains a date.

**Example:** =IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn't a date")

**Result:** Cell is a date

**ISBOOLEAN():** Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

**Example:** =IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn't a boolean")

**Result:** Cell is a Boolean

# Smartsheet Cheat Sheet

## Formulas

### Logic Formulas (cont.)

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

**Syntax:** AND(boolean\_expression1, boolean\_expression2, boolean\_expression3, ...)

**Example:** =IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")

**Result:** Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

**Syntax:** NOT(Done1)

**Example:** =IF(NOT(Done1), "Task A Not Complete", "Task A Complete")

**Result:** Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

**Syntax:** OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)

**Example:** =IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")

**Result:** Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

**Syntax:** IF(logical\_test, value\_if\_true, IF(second\_logical\_test, value\_if\_true, value\_if\_all\_false))

**Example:** =IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))

**Result:** This is Task A

# Additional Formulas and Help

**[Formula Basics](https://smartsheet.com/formula-basics)** - [smartsheet.com/formula-basics](https://smartsheet.com/formula-basics)

How to create a formula and reference cells, columns, and ranges in your sheet

**[Text Formulas](https://smartsheet.com/text-formulas)** - [smartsheet.com/text-formulas](https://smartsheet.com/text-formulas)

Find, Replace, capitalizing text, etc

**[Date Formulas](https://smartsheet.com/formula-basics)** - [smartsheet.com/formula-basics](https://smartsheet.com/formula-basics)

TODAY() formula, calculating working days, creating dates, etc

**[Advanced Formulas](https://smartsheet.com/date-formulas)** - [smartsheet.com/date-formulas](https://smartsheet.com/date-formulas)

Weighted average, prorata, countif, countifs, sumif, sumifs

**[Using Hierarchy in Formulas](https://smartsheet.com/using-hierarchy-in-formulas)** - [smartsheet.com/using-hierarchy-in-formulas](https://smartsheet.com/using-hierarchy-in-formulas)

How to reference child rows

**[Formula Error Messages](https://smartsheet.com/formula-error-messages)** - [smartsheet.com/formula-error-messages](https://smartsheet.com/formula-error-messages)

What they mean, and how to troubleshoot



smartsheet

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*PROJECT .03*

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